



ENROLLMENT AND COMPLIANCE

A Whole Institution Approach to Student Success



Who We Are



- For over **40+ years** we have been creating unique and **customized solutions** for each of our partner institutions.
- We have helped over **400+ Financial aid offices**.
- Our experienced **financial aid professionals** passionately support **student success**
- Our unwavering support is just a message or **call away**, with **dedicated team members** always ready to assist you.



Enrollment and Compliance

A Whole Institution Approach to Student Success

July 15, 2025, 4:30 PM - 5:30 PM



Katie Norris

Partnerships Manager
FA Solutions and ECM

**MEET
THE
SPEAKER**



Key Takeaways

- Cross functional strategies
- Enhancing student engagement and enrollment
- Breaking down silos and innovative approaches for streamlined enrollment management
- Engagement synergy



Unified Strategies through Cross-functional Training



Importance of understanding **shared responsibilities** to **foster empathy and cooperation** across departments



How **crossfunctional training** leads to a **more cohesive understanding of departmental roles**, now is the time



A Day in the Life

Role and Responsibilities

- Build **rapport** to inspire and understand **students' current and desired situations**
- Identify needs, **decisionmaking criteria**, and provide **relevant solutions**
- Ensure **students are well informed** and set **realistic expectations** about the requirements of becoming a student.
- Offer **clear directions**, maintain accountability for **deadlines**, and address **academic and financial preparedness**
- Keep **students engaged** and create lasting impressions to **foster a better institution**



A Cross Functional Approach

to Creating a
Transformational
Student Experience

- Building Relationships: Effective Interactions
- Concerns: Overcoming Objections
- Compliance and Transparency
- Deadlines and Accountability

Key Elements in Every Interaction ...



RAPPORT



QUESTION



LISTEN



NEEDS



VALUE



CONCERNS



INSPIRE



COMMITMENT

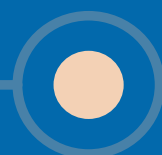
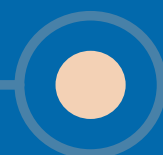
Breaking Down Silos Between Departments



The need for transparency in training to avoid perceptions of departmental bias.



Emphasizing a balanced approach where no department overshadows another.



Financial aid is interdependent with all the other offices at the school, and several are **dependent on financial aid**





Bringing Departmental Conversations In Sync

— “ —

Admissions is the
window
and financial aid
is the door

” —



Admissions

intertwines with Financial Aid

By changing the admissions process to include FA early and often, start rates improved by 50% from 2022 to 2023
—ATA College



Student Lifecycle

Let's Redefine Enrollment Management



Introduction to Admissions Student Flow



Communications Strategy

- Population-specific
- Timeline
- Purposeful
- Outcome-Driven
- Action-Oriented
- Volume

Introduction to

Admissions Student Flow

- Internal student handoff
- Student-Centered & Welcoming
- Leveraging Technology while remaining human-focused
- Ongoing interdepartmental training



Introduction to

Retention

Financial Aid

“

Once a student withdraws from the school, more than 50% never return; of the students that return, an estimated 33% graduate .

– ATA College

”



Introduction to

Retention

Proactive Student
communications



- Deadlines
- Academics
- Financial Aid
- Pre-Warnings

Trust Building Vs. Trust Busting

In every interaction, you will either
**increase or decrease your value
proposition**



Transparency and Compliance in Communication



Importance of **compliance and transparency**, ensuring **authentic student interactions**



Techniques for maintaining compliance while building genuine **rappor**t with students



Compliance is an entire school requirement



It takes all parts of enrollment management to ensure success not only for the student but the school as well - "admissions is the window – financial aid is the door"



High Risk Topics

Compliance in Enrollment Management



- Accreditation
- Transfer of Credit
- Job Outcomes
- Salary Expectations
- Tuition and Fees
- Financial Aid
- Graduation Rates
- Certification
- Pressure or Unethical Behaviors

Best Practices

Quality Assurance

- Training
- Reinforcing
- Inspecting
- Coaching



Effective Communication Across Departments



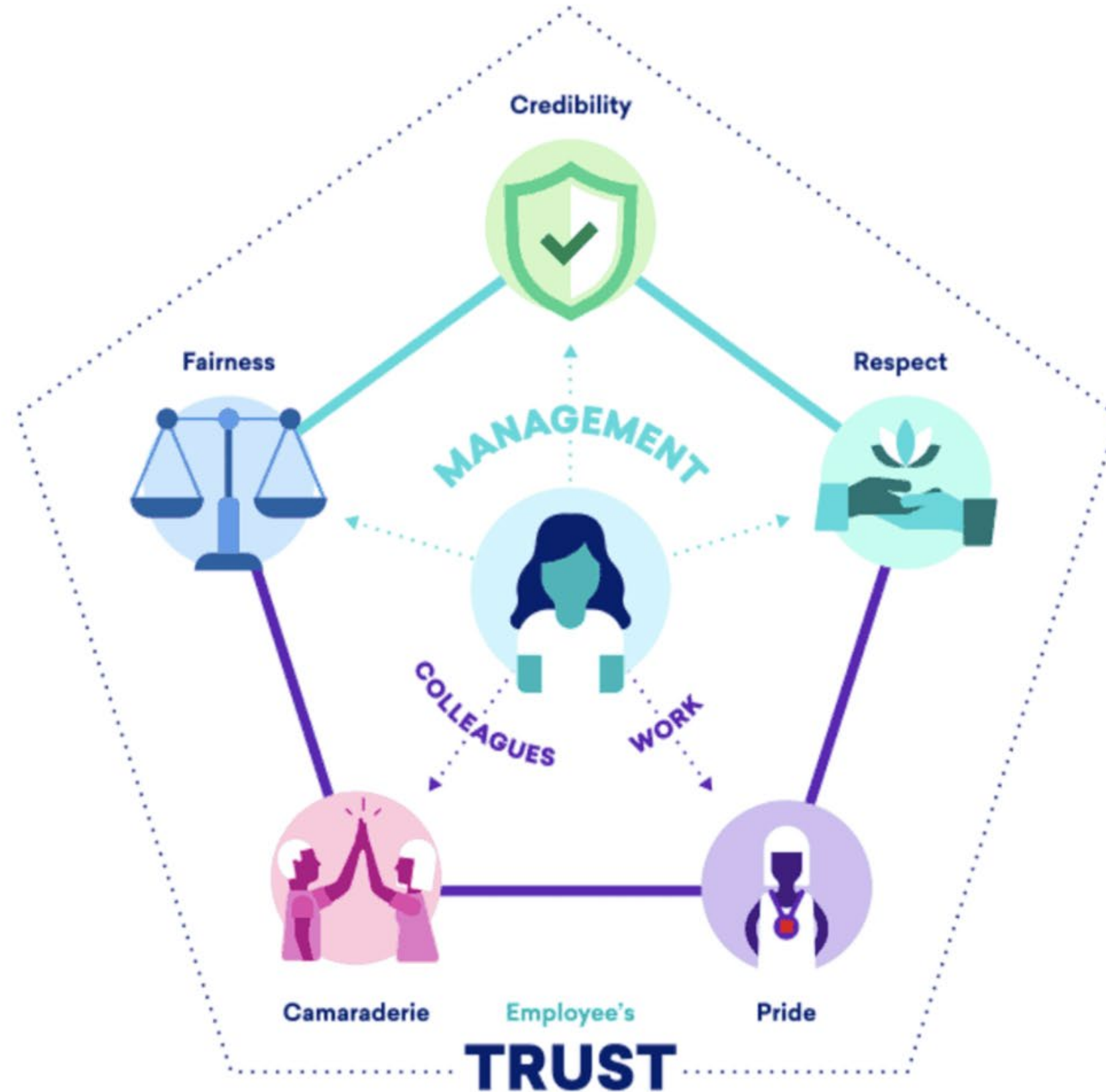
Importance of using **positive language** and **avoiding jargon** to **enhance communication clarity**



Strategies for **aligning messaging tones** across departments to **maintain consistency and trust**



Great Place to Work



3 Key Relationships

- Management
- Employees
- Job

5 Dimensions

- Credibility
- Respect
- Fairness
- Pride
- Camaraderie

Intentional Follow -ups and Communication



The role of purposeful follow-ups in **advancing student engagement**



Techniques for ensuring follow-up communications are **meaningful** and **contribute to the student's journey**



Leveraging Technology to Enhance Connectivity



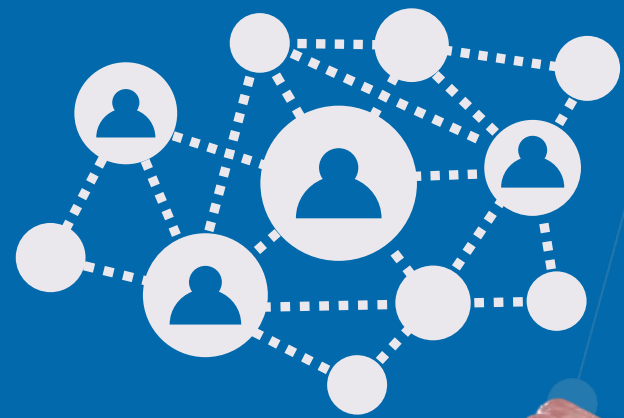
Best practices for using technology to **maintain connections with students remotely**



Examples of how platforms like **Teams or Zoom** can be used effectively to **bridge communication gaps**



Use **Technology** in every aspect to **connect with students**, but do not forget the importance of **human interaction**



“
Tech gives the quietest student a
voice.
~ Author Jerry Blumengarten



Speak the language of
your students

Tailor to your specific
student population

- Know who and how to speak with them
- Are they recent HS grads or reentry students?
- Do you need a parent support for the conversation or decision-making?





Time for questions



If you have any questions or would
like to discuss the topic further

Contact us



-  727-300-6336
-  fahelp@getfasolutions.com
-  GetFASolutions.com



-  516-679-1616
-  info@ecmfinaid.com
-  ECMFinAid.com